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Wealthtech Weekly

February 5, 2026

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Reporter

Advisors don't own the social media platforms they post on, so access to the audiences they've built there is merely rented. What happens when advisors decide to abandon these platforms, as has increasingly become the case with X, formerly Twitter? Advisors I spoke with said they've turned to other ways to build networks of clients and prospects.

Have you diversified your marketing? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

Why diversification matters when it comes to marketing

Social media platforms can change quickly (case in point: X). In response, advisors who may instead choose to rely on their own communication channels.

- **Ask an Advisor: What's the future of legacy CRMs in an AI world?**
  Relationship management systems are the traditional hub of financial advisors' technology stacks, but new AI tools may supplant them. Here's how advisors on the ground see it.

- **How agentic AI is showing up in advisor workflows**
  As AI agents move from theory to reality, some advisors are implementing these tools into their technology stacks, but not without human oversight.
- **AI leads family office investment themes, JPMorgan says**
  Artificial intelligence tops the investment priority list for family offices globally, a survey from JPMorgan's private bank shows, though allocations lag and remain concentrated in public equities.
- **2026 expert predictions: What's next for wealth management**
  From AI advancements to greater access to private markets to the forces shaping retirement, six experts share their hot takes on what's just over the horizon in wealth management.

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